PERFORMANCE-BASED SPECIFICATIONS AND STATEMENTS OF WORK (SOW) TRAINING COURSE

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TRAINING COURSE TOPICS

Session I:

- Overview of Acquisition Reform
- Writing Performance-Based Specifications
- Specification Requirements Exercises

Session II:

- Writing Performance-Based SOW's and corresponding CDRL's
- SOW/CDRL/DID Exercises
- Request for Proposal (RFP) Breakdown

"Performance-based" means to identify "what" is required (results/outcomes), not "how to" perform the work

CHANGING ENVIRONMENT

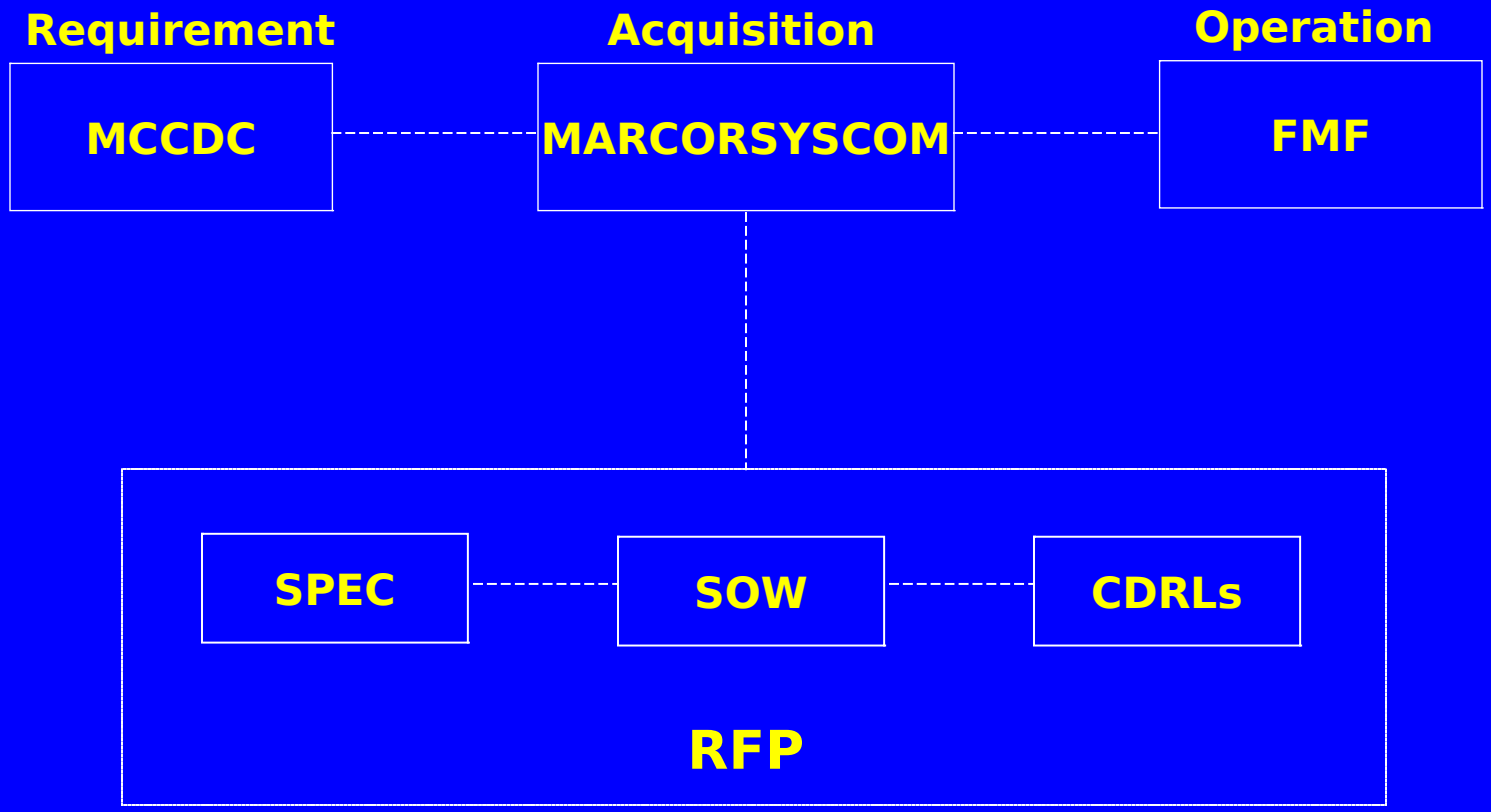
- Budget dropped 32% since end of cold war (constant FY99 dollars)
- Spending on new equipment -- down 50%
- Active duty strength down nearly 33% since the Berlin Wall fell
- Our forces must be lean, agile, high-tech, and ready to fight anywhere at a moments notice
- Technology readily available to anyone -- even third world nations

WHY ACQUISITION REFORM?

AR OBJECTIVES

- Maintain technical superiority and a strong national industrial base
  - Rapidly acquire state-of-the-art technology & products
  - Expand to the commercial industrial base
  - Transfer military technology to commercial sector
  - Preserve defense-unique core capabilities
- Reduce acquisition costs by adopting world-class business processes
  - Market research and cost performance trade-offs
  - Avoid Government-unique terms and conditions when possible

ACQUISITION OVERVIEW



ACQUISITION STRATEGY

HOW WILL WE?

- Contract for the item (Fixed-fee, Time and materials, Fixed-fee w/ incentives)
- Develop the item (COTS, NDI, Total Development)
- Test the item (Contractor approved, Government, or develop new)
- Produce the item (Sole source, multiple contractors)
- Field the item (Which unit, how many items, when needed)

MARKET RESEARCH

WHAT IS IT?

- A continuous process for gathering data on product characteristics, supplier's capabilities and business practices that surround them - plus the analysis of that data to make acquisition decisions (SD-5, Market Research, July 1997)

- Research information should be used for the content of (1) product description, (2) the support strategy, (3) terms and conditions to be included in the contract and (4) evaluation factors used for source selection

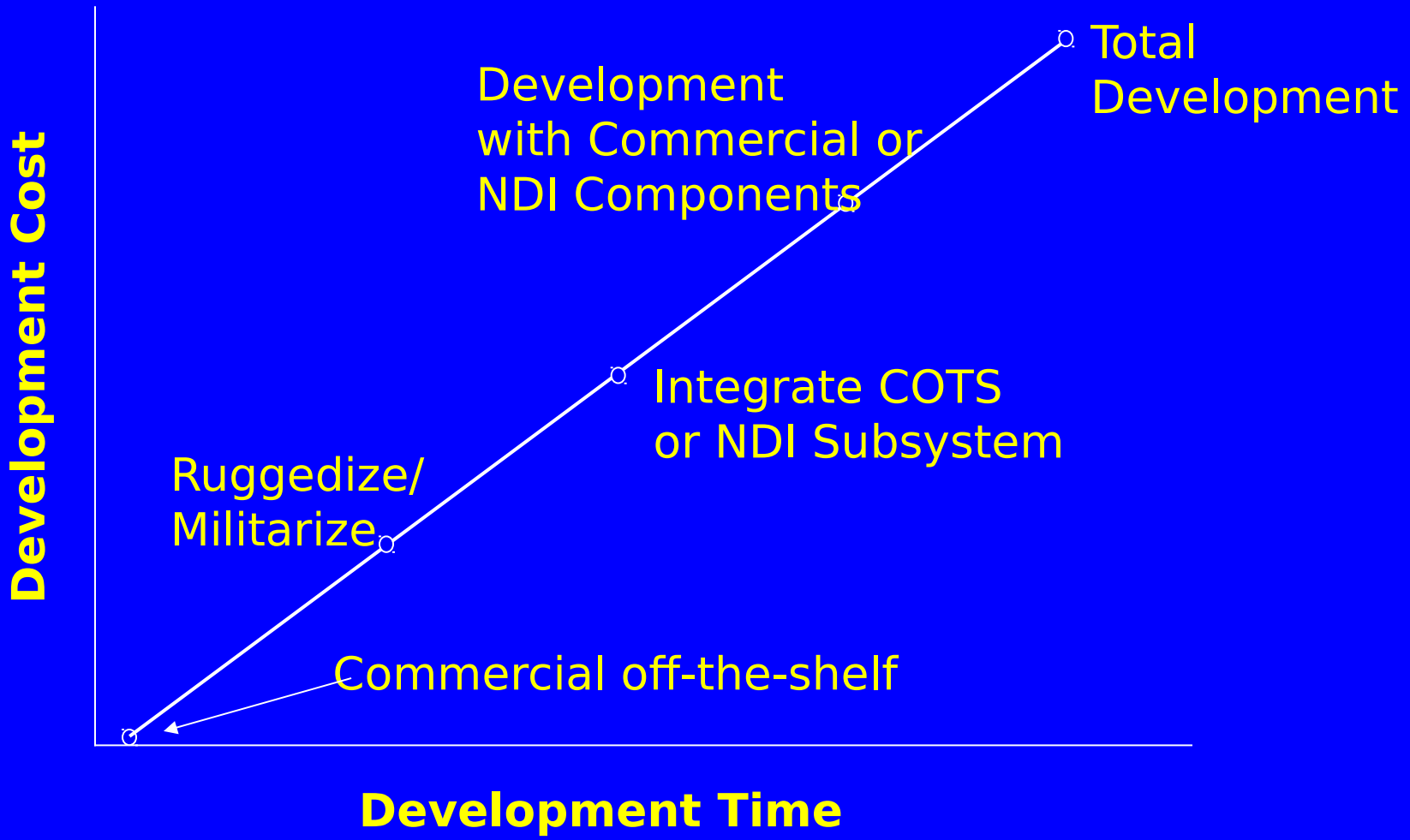
- Two phases:
  - Surveillance -- Keeping abreast of technology and product upgrades
  - Investigation -- In-depth, looking for specific requirements

MARKET RESEARCH

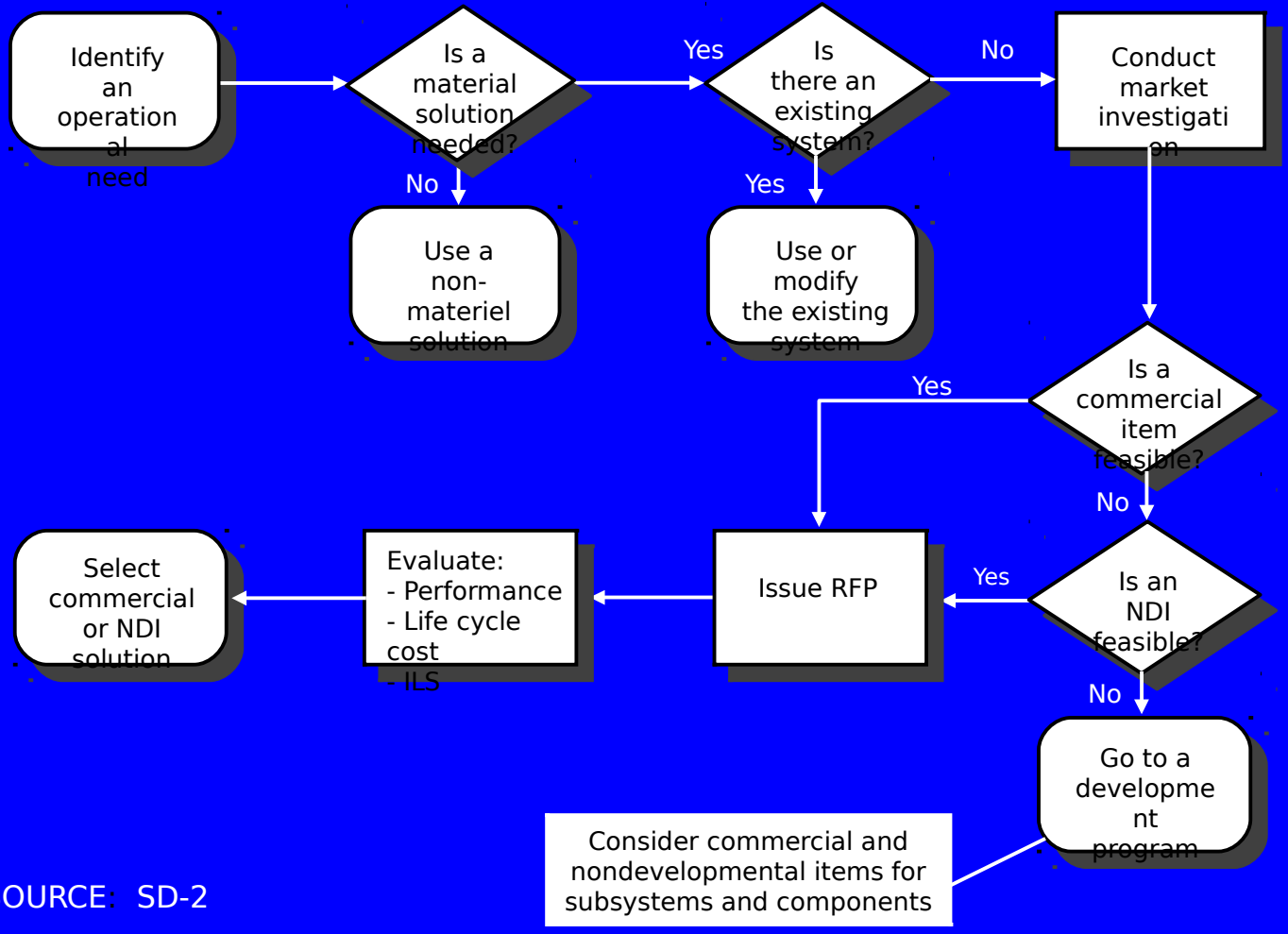
WHO DOES IT & WHY?

- Conducted by everyone involved in acquisition
- Identify opportunities for use of commercial products or services to meet defense needs
- Access to latest technology -- state-of-the-art integrated into weapons systems
- Reduce costs
- Reduced acquisition time -- not 12 to 18 years
- Write specifications and SOWs to allow companies to offer commercial items and services -- flexibility

ACQUISITION APPROACH FOR NEW NEEDS



COMMERCIAL/NDI DECISION PROCESS



SOURCE: SD-2

*In preparation for the market investigation establish objectives and thresholds for cost, schedule, and performance based on the users' operational and readiness requirements.

MARKET SURVEILLANCE

- The continuing effort by acquisition personnel to remain abreast of technological advances, changes, and trends within their commodity areas
- Provides knowledge base as to what is available in the market place
- Data sources:
  - Travel journals
  - Professional societies
  - Personal contacts
  - Industry representatives
  - Equipment users
  - Other Services
  - I-MART - DoD's Internet Market Research Tool (www.i_mart.org)

MARKET INVESTIGATION

- Determine to a high degree of confidence products/services is available to satisfy need
- Scope/extent and documentation varies ($ value, complexity, density needed, etc.)
- Generic model uses six parts. Not all parts are necessary for all acquisitions

1. Summarize Market Surveillance users/buyers
2. Identify sources candidates
3. Survey manufacturers results
4. Check
5. Evaluate
6. Document

EXAMPLE

SNIPER RIFLE - PERFORMANCE CHARACTERISTICS

Candidates	System Life (rounds)	Magazine (rounds)	Recoil (ft-lbs)	Collapsed Size (inches)	Accuracy (P_h)	Body Armor Penetration Range (meters)
Requirement	10,000 min	5 min	22 max	46 max	.85 min	800 min
Supplier A	10,500	11	26.0	12.3	.88	800
Supplier B	5,000	5	11.9	15.2	.86	750
Supplier C	5,000	10	9.5	13.5	.85	620
Supplier D	12,000	10	10.5	8.0	.94	860
Supplier E	5,000	10	12.9	14.7	.86	550
Supplier F	5,000	15	10.0	28.8	.89	800
Supplier G	9,000	10	18.7	14.9	.87	900
Supplier H	7,000	20	8.9	10.4	.85	925
Supplier I	8,000	5	12.0	8.1	.85	800
Supplier J	10,500	10	11.5	15.8	.91	800
Supplier K	6,000	5	15.6	12.5	.86	900
Supplier L	8,000	20	7.4	12.3	.94	850
Supplier M	11,000	15	16.4	9.8	.93	950

SINGLE PROCESS INITIATIVE

THE OLD WAY

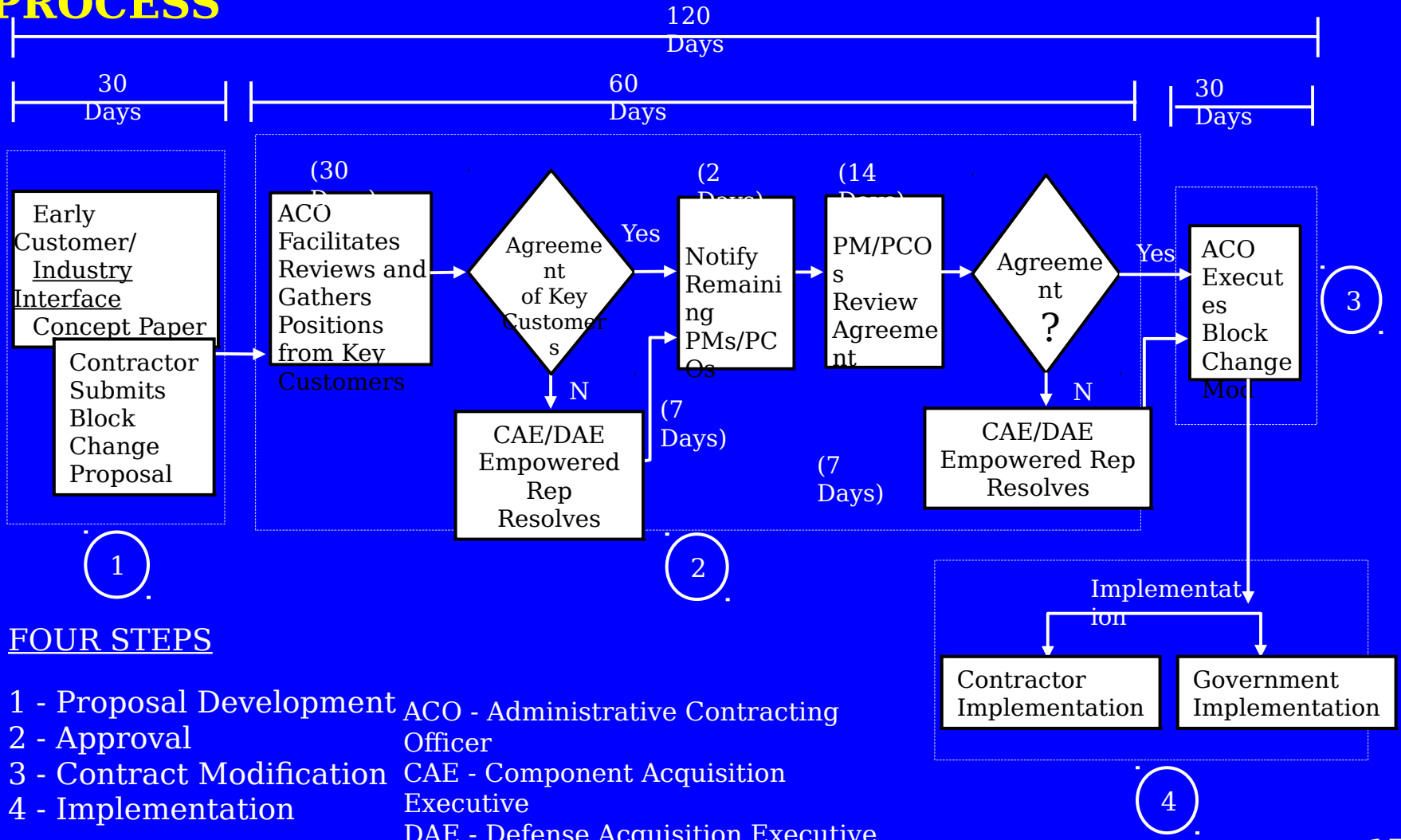
- Numerous Government Specs/Stds imposed in each contract
- Multiple contracts resulted in multiple processes
- Contractors had multiple processes to satisfy requirements
- Contractor incurred costs because of imposed Specs/Stds --- passed costs onto Government as increased overhead

THE NEW WAY

- Contractor can propose, for the Government's approval, to use a single manufacturing or management process on all Government contracts at a facility
- Applies to new and existing contracts

SINGLE PROCESS INITIATIVE

BLOCK CHANGE PROCESS



FOUR STEPS

1 - Proposal Development
2 - Approval
3 - Contract Modification
4 - Implementation

ACO - Administrative Contracting Officer
CAE - Component Acquisition Executive
DAE - Defense Acquisition Executive

SINGLE PROCESS INITIATIVE

MAJOR CONTRACTORS PARTICIPATING

- Raytheon
- Lockheed-Martin
- Texas Instruments
- Hughes Tucson
- Loral Federal Sys, NY
- Boeing
- Rockwell Collins
- GE ACFT Engines

FREQUENTLY PROPOSED CHANGES

- Quality Program System
- Electronic MFG
- Configuration (Control)
- Calibration Standard
- Material Review and Management
- Cost Data Reporting
- Military Soldering
- Test Requirements Data

SINGLE PROCESS INITIATIVE

SUMMARY

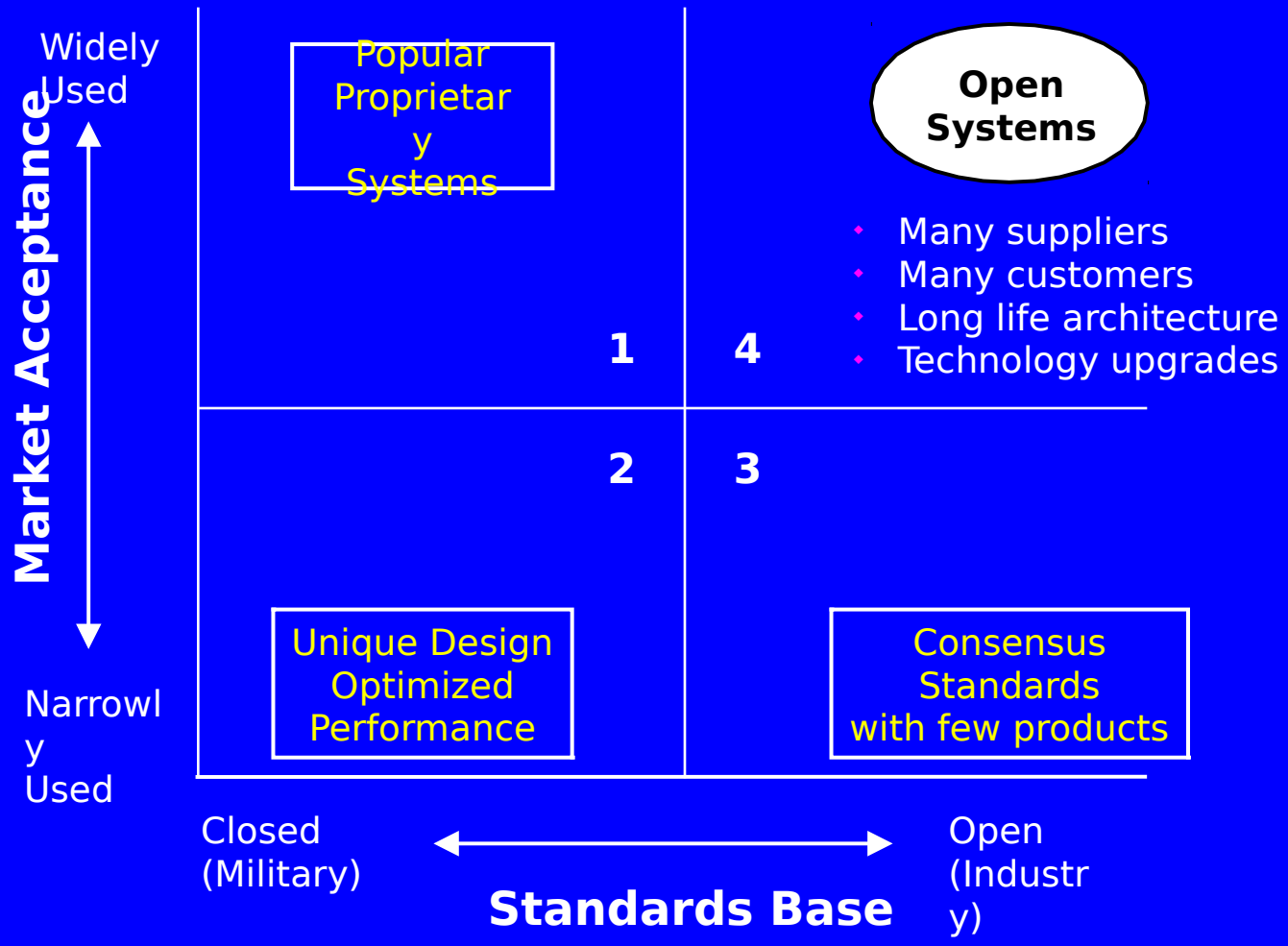
- Early communication between Government and Contractor
- Contractor proposes Concept Paper to use a single process at a facility for all Government contracts
- Government reviews request, representatives from each contract at that facility participates
- Upon approval, a block change is made which applies to all Government contracts at that facility
- SPI is designed to speed the acquisition process and reduce costs
- For more information go to www.acq-ref.navy.mil, click on the “Standardization” button and then go to the “SPI” section.

OPEN SYSTEMS

WHAT IS IT?

- A system that has well defined, widely used, non-proprietary interfaces
- The interface standards are developed/adopted by industrially recognized standards bodies (IEEE, ANSI, etc.)
- Contractors choose and design the implementations. This allows for changes in technology
- DoD 5000.2-R, Part 3 requires OS for all systems
- Some common interfaces are:
  - Spark plugs, tires, electrical outlets
  - Engine - Transmission - Drive Shaft - Differential

OPEN SYSTEMS



SUMMARY

BENEFI TS

- State-of-the-art systems
- Easier technology insertion
- Increased competition -- better performance
- Reduced development life cycle cost

POSSIBLE RISKS

- Government has less control over outcomes
- Interface standards selection process has risks
- Building OS's takes time

Remember: The first to field new technology wins!

PERRY MEMO

SECDEF POLICY MEMO STATES:

- Performance specifications are now the preferred way to state requirements. Describes requirements in terms of "**WHAT**, not **HOW TO.**"
- If not practicable to use a performance specification, use Non-Government Standard (i.e., ASTM, ASME, IEEE, SAE, etc.)
- Detail specifications can be used only if:
  - Performance specification is not cost-effective
  - Non-Government Standard (NGS) does not exist
  - Detail design solution is needed
- All references below the first tier are for guidance only (except for NGS's where all tiers are contractually binding)

MARINE CORPS POLICY

- **Performance Specifications** --

  "Performance specifications shall be used when purchasing new systems, major modifications, upgrades to current systems, and non-developmental and commercial items, for programs in any acquisition category." (Perry memo of 29 June 1994)

- **Reprocurements** --

  - All actions equal to or more than $300,000 will be subjected to a business-case analysis to determine the life cycle impact of converting the Technical Data Package (TDP) to performance terms
  - All actions less than $300,000 will have the TDP reviewed for opportunities for improvement and for possible elimination of military specifications and standards

WHY PERFORMANCE SPECs?

- Take advantage of technological advances
- Reduce acquisition costs
- Expand towards commercial industrial base
- Reduce lead time
- Place design responsibility on contractor

CHARACTERISTICS

DETAIL SPEC

- Contains design solutions
- How requirements are to be achieved
- How an item is to be fabricated
- How an item is to be constructed

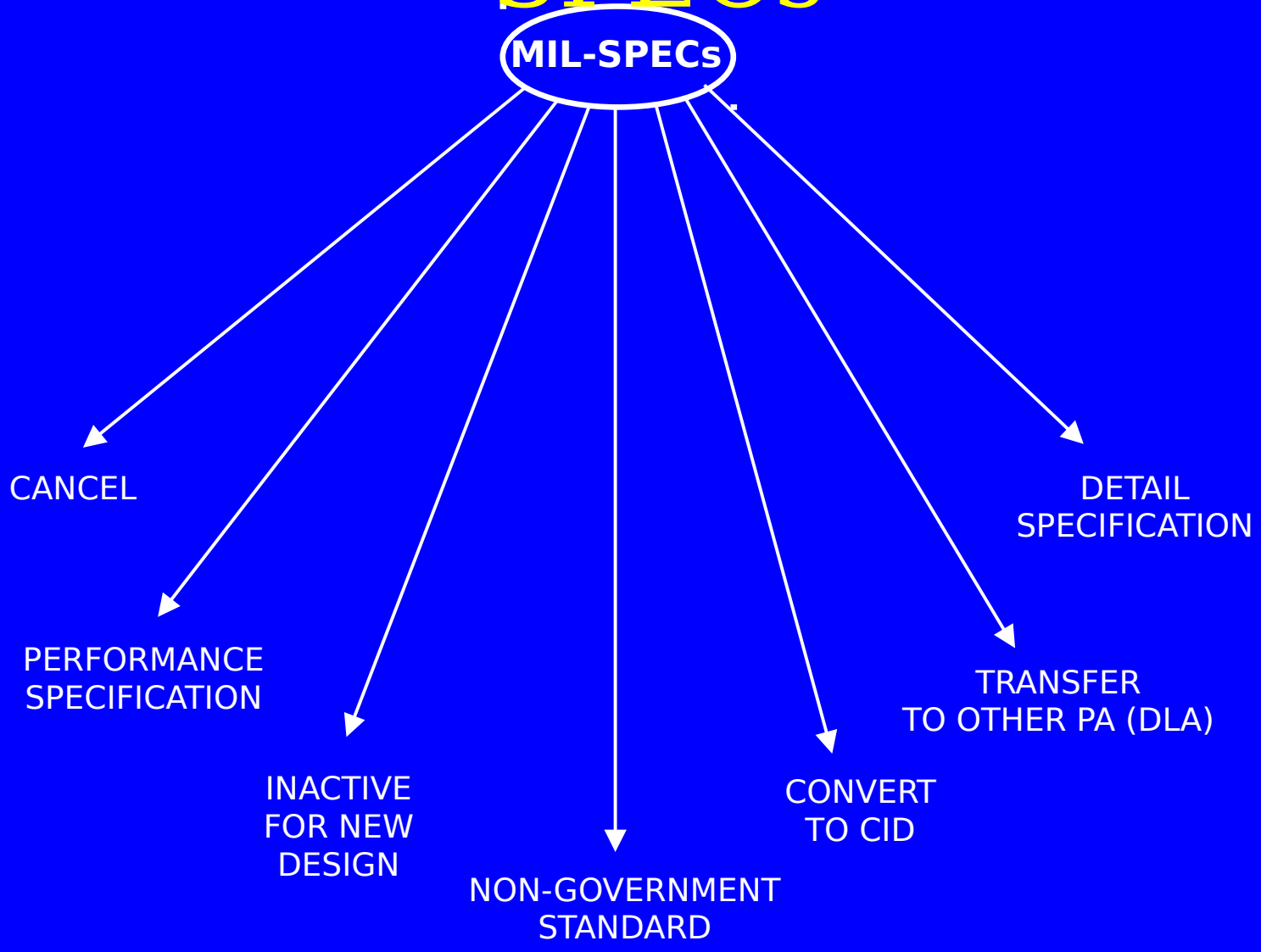
"HOW TO"

PERFORMANCE SPEC

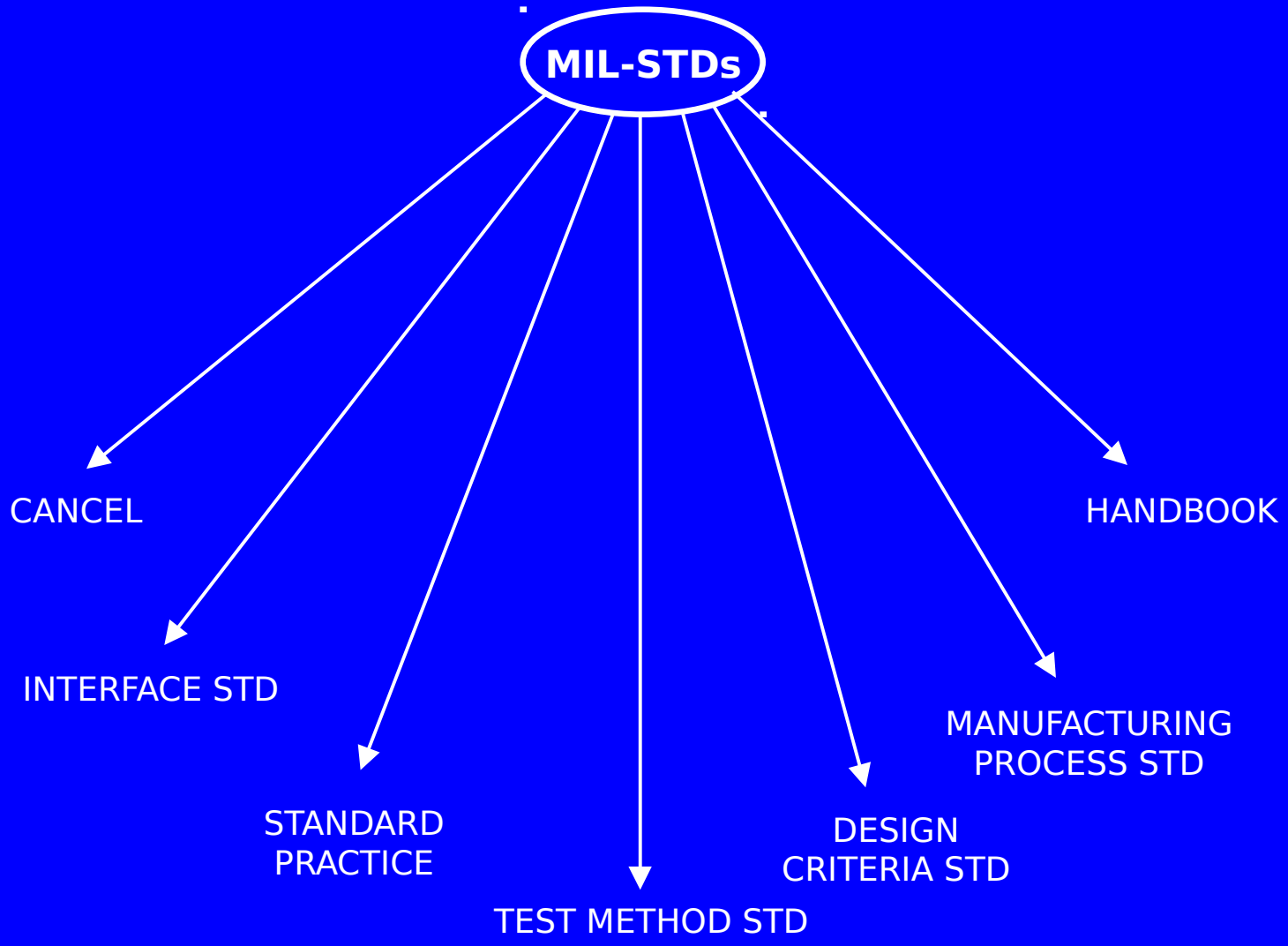
- Defines function of item
- Environment in which it must operate
- Interface/Interchangeability requirements
- Criteria for verifying compliance

“WHAT”

TRANSITION FROM MIL-SPECs



TRANSITION FROM MIL-STDs



WHAT'S THE DIFFERENCE?

- **Specifications - Technically Oriented**
  - are prepared specifically to support acquisition, the **PRODUCT**
  - establishes requirements in terms of performance or detail
  - includes procedures necessary to determine compliance with proposed products
- **Standards - Management Oriented**
  - establishes requirements for **processes**, **procedures**, **practices**, and **methods** that have been adopted as standard
  - controls variety and include materials, items, definitions, nomenclature, test methods and inspection, packaging and preservation methods and materials, engineering practices and processes, codes, symbols, type designations, etc.

ACQUISITION REFORM RESULTS

FROM JUNE 94 TO JUNE 99

- 7,415 Military Specifications canceled (out of over 29,000)
- 737 Military Standards canceled (out of over 1,700)
- 6,162 Documents inactivated for new design
- 2,209 Non-Government Standards adopted (now over 7,700 total)
- 679 Commercial Item Descriptions published

MIL-STD-961D SPECIFICATIONS

- “DoD Standard Practice for Defense Specifications”
- Appendix A is for program-unique (system) specifications
- Specification sections:
    1. Scope
    2. Applicable Documents
    3. Requirements
    4. Verification
    5. Packaging
    6. Notes
- No table of contents in specifications -- indexes are allowed

SECTION 1 - SCOPE

- Not contractually binding
- A clear, concise abstract of item/entity
- Identification of entity
- System overview
- Do not list requirements in this section

SECTION 2 - APPLICABLE DOCUMENTS

- Contains all documents referenced in Sections 3 and 4
- Use “Mandatory” and “Guidance” headings for all documents listed
- Specifications, standards, other government documents, drawings, publications, and non-government documents
  - For system specifications list exact revision levels and dates
- Documents referenced in Section 6 are not listed
- Generally, there are more references in Detail Specifications than Performance Specifications

SECTION 3 - REQUIREMENTS

- State requirements that the entity must meet to be acceptable:
  - Function and performance (mission, threat, user needs, reliability, maintainability, environmental conditions, computer resource, support requirements)
  - Interface (Government-furnished property, external)
  - Design and construction (drawings, software design)
- General principles:
  - Describe in a manner to encourage competition
  - Requirements shall be clear and provide a definitive basis for rejection or firm criteria for acceptance (don’t make the test the requirement)

SECTION 4 - VERIFICATION

- Contains all inspections to be performed to determine compliance with Section 3
- All products must be capable of achieving every verification
- Do not include quality requirements that belong in the contract (do not use Acceptable Quality Levels)
- Include a cross-reference matrix between paragraphs of Sections 3 and 4
- Reflect widely accepted industry verifications where possible

SECTION 4 - VERIFICATION

Methods of verification for program-unique (system) specifications are:

- Analysis - uses established technical or **mathematical models or simulations**, algorithms, charts, graphs, circuit diagrams.
- Demonstration - the **actual operation**, adjustment, or re-configuration of items **in specific scenarios**.
- Examination - using **simple, nondestructive investigation** procedures or measurements (typically sight, hearing, smell, touch, and taste).
- Test - **determination of the properties or elements of items**, including functional operation, using established scientific principles/procedures.

SECTION 4 - EXAMPLE MATRIX

Section 3 Requirements	Methods of Verification				Classes of Verification			Section 4 Verification
	A	D	E	T	Design	First Article	Acceptance/ Conformance	
3.3.1		X			X			4.3.1
3.3.2			X		X	X		4.3.2
3.3.3			X		X	X		4.3.3
3.3.4	X		X		X			4.3.4
3.3.5	X					X	X	4.3.5
3.3.6				X			X	4.3.6

SECTION 5 - PACKAGING

- Mandatory paragraph from MIL-STD-961D:

"5. PACKAGING

5.1 Packaging. For acquisition purposes, the requirements shall be as specified in the contract or order (see 6.2). When actual packaging of material is to be performed by DoD personnel, these personnel need to contact the responsible packaging activity to ascertain requisite packaging requirements. Packaging requirements are maintained by the Inventory Control Point's packaging activity within the Military Department or Defense Agency, or within the Military Department's System Command. Packaging data retrieval is available from the managing Military Department's or Defense Agency's automated packaging files, CD-ROM products, or by contacting the responsible packaging activity."

- Packaging requirements are to be in the contract
- If packaging is a performance issue, needs should be defined in Section 3 as a requirement

SECTION 6 - NOTES

- Not contractually binding
- Contains information of a general or explanatory nature, and no requirements
- Intended use
- Definitions, acronym list and abbreviations
- References guidance documents not listed in Section 2 along with a brief description of the purpose for providing that document as guidance
- When using a performance specification for a reprocurement, the TDP from the current system can appear in this section for guidance and information only to the contractor.

MIL-STD-962C-STANDARDS/HANDBOOKS

- "DoD Standard Practice for Defense Standards and Handbooks"
- Handbooks are not to be cited as requirements and are for guidance only
- There are five types of DoD-prepared standards:
  - Interface - for military-unique interface requirements (MIL-STD-461E, Requirements for the Control of Electromagnetic Interference Emissions & Susceptibility and MIL-STD-1840, Automated Interchange of Technical Information)
  - Standard Practice - to specify procedures for conducting non-manufacturing functions (MIL-STD-129N, Marking for Shipment and Storage)

MIL-STD-962C BREAKDOWN

- Test Method - (requires waiver) - for military-unique requirements testing (MIL-STD-810E, Environmental Test Methods & Engineering Guidelines)
- Design Criteria - (requires waiver) - for military-unique design or functional criteria that must be adhered to in development (MIL-STD-1472D, Human Engineering)
- Manufacturing Process - (requires waiver) - for very limited situations where the DoD alone has the technological expertise for a manufacturing process

MIL-STD-962C BREAKDOWN

- Foreword
- Table of Contents
- Section 1 - Scope
- Section 2 - Applicable Documents
- Section 3 - Definitions
- Section 4 - General Requirements
- Section 5 - Detailed Requirements
- Section 6 - Notes

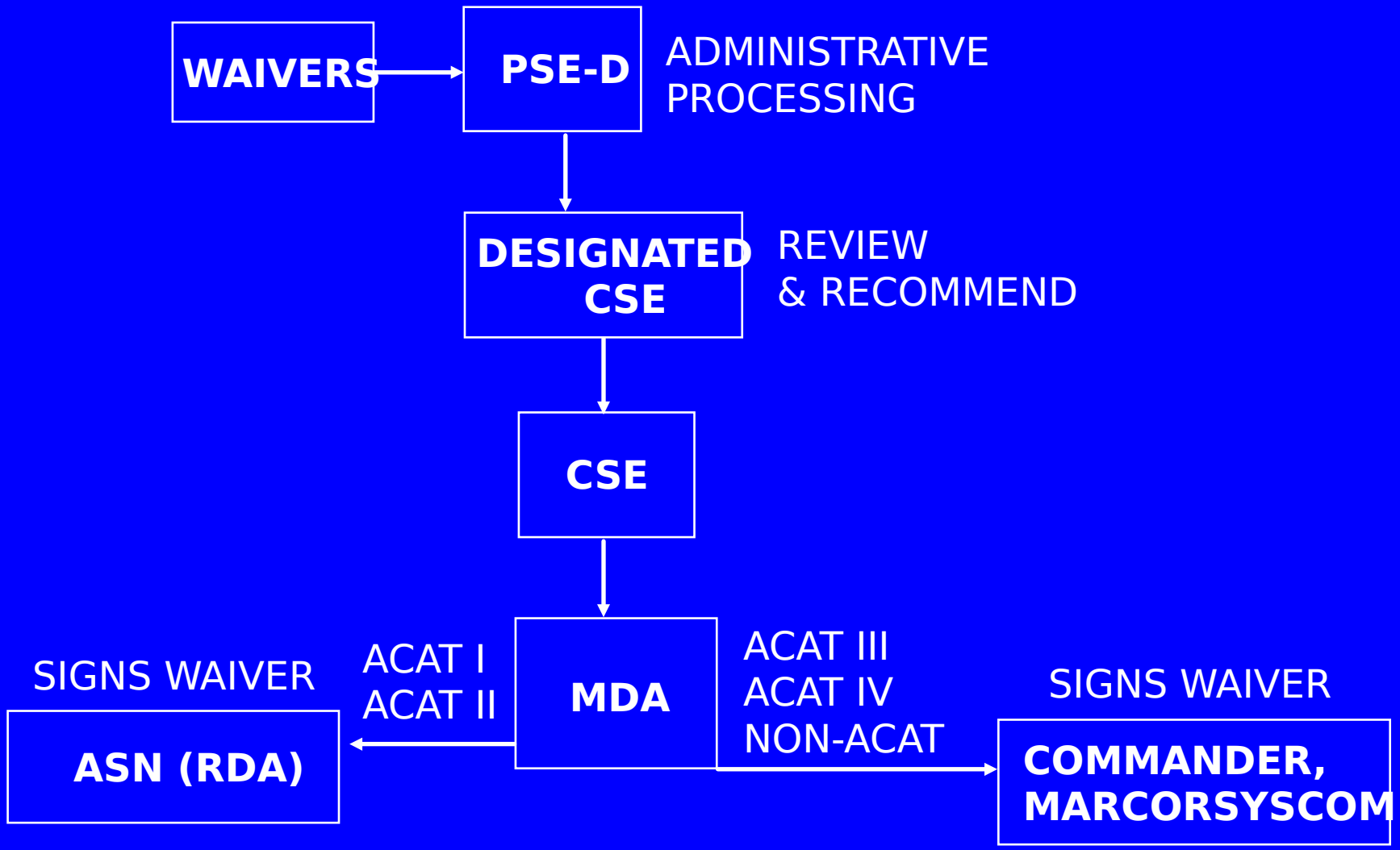
WAIVERS

- Documents **requiring** waivers:
  - Military specifications
  - Program unique detail specifications
  - Federal specifications and standards
  - Test Method, Design Criteria, and Manufacturing Process standards
  - Any type of Government or Non-Government specification or standard that describes management or manufacturing processes

WAIVERS

- Documents **not requiring** waivers:
  - Documents granted 2-year DoN Department-Wide Waivers (see DoN waiver listing) (see Tab 6)
  - Any document required by Law, FAR, DFARS, DoDD 5000.1, or DoD 5000.2-R
  - Non-Government standards (except management or manufacturing processes)
  - Select Federal Information Processing Standards (see Tab 9)
  - Performance Specifications in DoD Index of Specifications and Standards (DoDISS)
  - Commercial Item Descriptions (CIDs) in DoDISS
  - Interface Standards and Standard Practices in DoDISS

WAIVER APPROVAL PROCESS

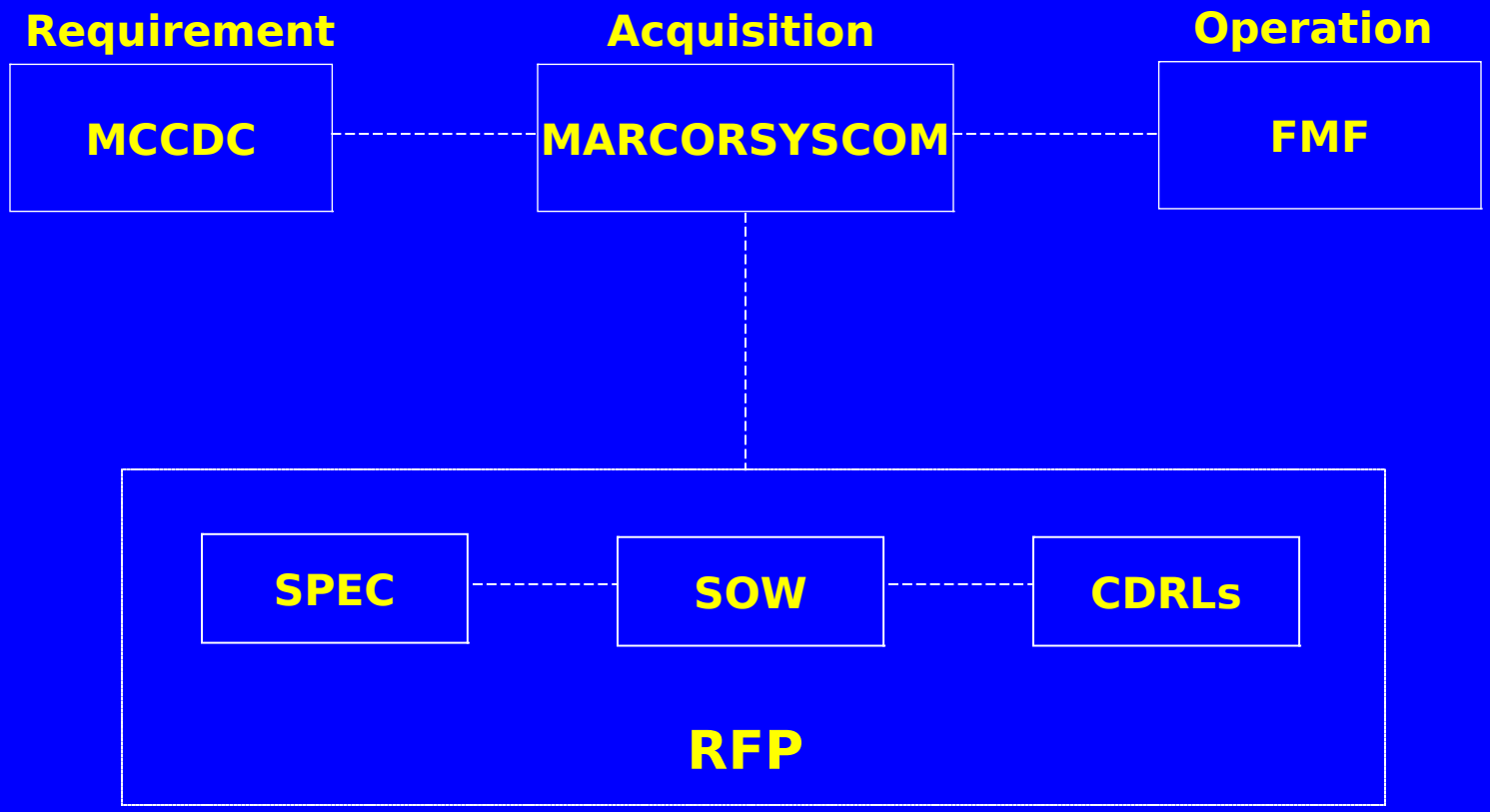


SUMMARY

- Market Research is a major component of acquisition reform
- Be aware of the Single Process Initiative
- Use the Open Systems approach
- Performance specifications describe “what” not “how to”
  - Define function of item
  - Operating environment
  - Interface/Interchangeability
  - Criteria for verifying compliance
- MIL-STD-961D ➔ Format and guidelines for writing DoD specifications and system specifications

STATEMENT OF WORK

ACQUISITION OVERVIEW



STATEMENT OF WORK (SOW)

- Section “C” of the Request for Proposal (RFP)
- Describes what you want the vendor to provide
- In performance terms
- Tells the vendor what tasks you want them to do
- Structure three main sections
  - Scope
  - Reference Documents
  - Requirements

REFERENCES

- MIL-HDBK-245D, Handbook For Preparation of Statement of Work (SOW)
- Acquisition Strategy
- Operational Requirements Document (ORD)
- Performance Specification

DATA CALL IPT

- The Project Officer convenes a Data Call Integrated Product Team (IPT) Meeting
- Review Acquisition Strategy
- Determine work requirements and data deliverables
- Develop Draft SOW using Statement of Work CDRL, And Tracking Tool (SCATT)

SECTION ONE: SCOPE

1.0 Program Information

- Acquisition Phase
- Program Description
- What We Want To Have as an End Result

1.0 Scope. This Statement of Work (SOW) sets forth the effort required by the Contractor for the manufacture, testing, production, delivery and support of the ABC System. It includes the associated program management, human engineering, manufacturing and logistic support efforts required to ensure compliance with the performance specification.

1.1 Background. The ABC System program has been initiated to procure, test and deploy a system that will lay and retrieve ABC's at a faster rate than the current method. Currently, the ABC System program has entered the

SECTION TWO: APPLICABLE DOCUMENTS

2.0 APPLICABLE DOCUMENTS. The following documents of the exact date and issue specified form a part of this Statement of Work (SOW) to the extent specified herein. In the event of conflict between the applicable documents and this SOW, the SOW shall take precedence. All second tier and below references cited [in mandatory compliance documents] shall be considered as guidance only. Nothing in this document, however, supersedes applicable laws and regulations unless a specific exemption has been obtained.

2.1 Military/Federal Standards and Specifications Mandatory

2.2 Military/Federal Standards and Specifications Guidance Only

2.3 Drawings

2.4 Handbooks (Guidance Only)

2.5 Other Government Documents

SECTION THREE: REQUIREMENTS

3.1 Management

- Meetings
- Reviews

3.2 System Engineering

- Quality Management
- Reliability and Maintainability
- Configuration Management

3.3 Logistics

- Provisioning
- Supply Support

GUIDANCE FOR WRITING SOWs

DO'S	DON'TS
1. Focus on "What"	1. Focus on "How"
2. Be clear and concise	2. Be broad and vague
3. Define your tasks	3. Be open for interpretation
4. Know and check references	4. State input measures
5. Put delivery information in CDRL, not in SOW	5. Be wordy
	6. Select references just because they were in the last SOW or worked before
	7. Cut and paste

RULES FOR WRITING

- Define all abbreviations and acronyms
- Use Active Voice - spell out who is responsible
- Use of “Shall” and “Will”
  - Shall = Mandatory
  - Will = Government Action
- Avoid “as necessary”, “if required”, “as required”
- Do not overspecify - identify results - not how to do it

WORK WORDS

- Construct (put together; build)
- Create (cause to be; make)
- Erect (put together; set upright)
- Fabricate (build; manufacture, invent)
- Form (give shape to; establish)
- Integrate (to add parts to make whole)
- Manufacture (fabricate from raw materials)

PHRASES NOT TO USE

- In the opinion of the contracting officer

- Unless otherwise directed
- To furnish if requested

- Accurate workmanship
- Properly assembled
- Pleasing lines
- Carefully performed

CONSEQUENCES

- Poorly prepared SOWs can often lead to:
  - Confusion as to scope of work
  - Delays in vendor selection
  - Unnecessary litigation
  - Disputes and claims
  - Contract cost overruns
  - Strained vendor/Government relations

WHAT'S WRONG?

3.4.1.1 First Article Test. The contractor shall develop a First Article Test (FAT) plan and implement First Article Test procedures to demonstrate the conformance of the Antitank Hamster to the performance requirements of the system specification. The contractor shall notify the Government 60 days before the test and deliver the test plan in accordance with CDRL DI-NDTI-80603. The Government will have 15 days to review the plan for approval. The Government reserves the right to attend all tests. The contractor shall deliver to the Government the test results in accordance with CDRL DI-NDTI-80809B after the test completion.

BETTER

3.4.1.1 First Article Test. The contractor shall develop a First Article Test (FAT) plan and implement First Article Test procedures to demonstrate the conformance of the Antitank Hamster to ~~the performance requirements of the system specification. The contractor shall notify the Government 60 days before the test, and deliver the test plan in accordance with CDRL DI-NDTI-80603.~~ The Government will have 15 days to review the ~~plan for approval. The Government~~ reserves the right to attend all tests. The contractor shall deliver to the Government the test results in accordance with CDRL DI-NDTI-80809B after the test completion.

(DI-NDTI-80603, Test Procedure)
(DI-NDTI-80809B, Test/Inspection Report)

WHAT'S WRONG?

4.6.3

a. Ice Resistance. To determine if the Antitank Hamster is damaged or made unserviceable by ice or freezing rain, the test units during cold weather testing shall be flooded with sufficient water to simulate a soaking rain shower. If, when the water freezes, the Antitank Hamster does not remain fully functional despite the presence of ice, the Antitank Hamster shall be determined as having failed the ice test.

BETTER

The paragraph should not be in the SOW.

It appears to be a poor example of a verification paragraph that would be found in the specification.

WHAT'S WRONG?

3.2.1 In Process Reviews (IPR). The contractor will be prepared to host quarterly one day IPRs at his facility to review the progress of the effort. These IPRs will be conducted on dates agreed upon between the Government representative and the contractor's Program Manager. The contractor's Program Manager shall be prepared to discuss the production status and any issues related to contract execution.

BETTER

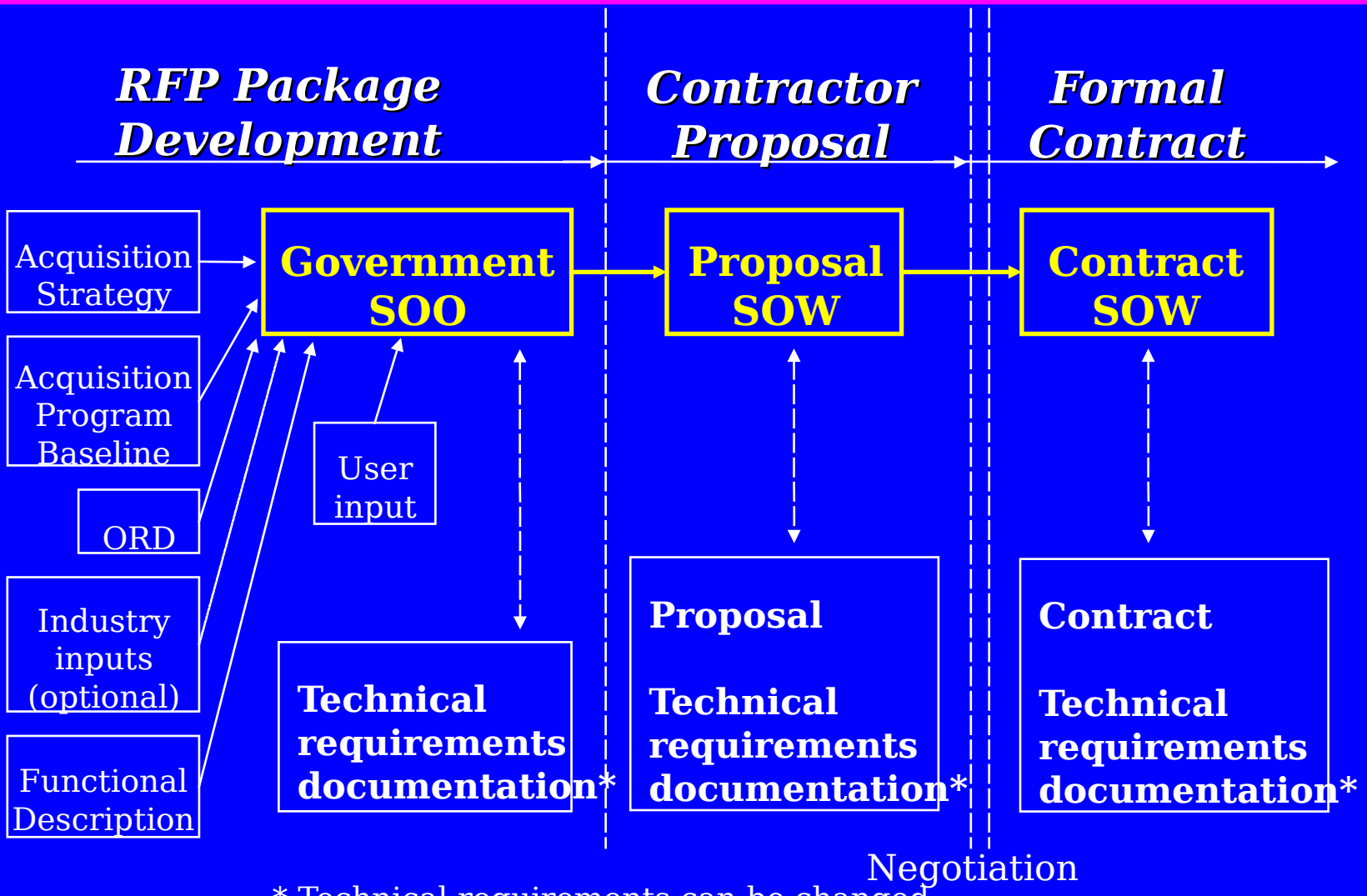
3.2.1 In Process Reviews (IPR). The contractor ~~shall will~~ be ~~prepared~~ to host quarterly one day IPRs at his facility to review the progress of the effort. These IPRs will be conducted on dates agreed upon between the Government representative and the ~~contractor's Prog~~ram Manager. The contractor's Program Manager shall brief be prepared to discuss the production status and any issues related to contract execution.

STATEMENT OF OBJECTIVES

A Statement of Objectives (SOO) is a Government prepared document that describes the basic, top-level objectives of the acquisition. It can be used where the intent is to provide the maximum flexibility to each offeror to propose an innovative development approach. (Section 5 of MIL-HDBK-245D)

- Offerors use the RFP, performance specification and SOO as a basis for preparing their proposals - including a SOW and CDRL package.
- Provides the Government with an opportunity to assess the offeror's understanding of all aspects of the effort to be performed, by eliminating all "how to" instructions.
- A SOO is normally 2-4 pages in length and should address product oriented goals rather than performance requirements.

STATEMENT OF OBJECTIVES



* Technical requirements can be changed due to performance/cost tradeoffs.

DATA REQUIREMENTS AND DELIVERABLES

- Data Item Descriptions (DIDs)
  - Describes the data products to be delivered by the vendor
  - If necessary, DID's are altered by the CDRL (block 16). The DID itself cannot be changed.
  - Approved DIDs are listed in DoD 5010.12-L, "Acquisition Management System and Data Requirements Control List (AMSDL)"
- Contract Data Requirements List (CDRL)
  - Contractual vehicle ties SOW and DIDs
  - Used to tailor DIDs (block 16)
  - Provides delivery schedule

NOTE: CDRL/DID guidance and information is found in DoD 5010.12M, "Procedures for the Acquisition and

DATA ITEM DESCRIPTION

DATA ITEM DESCRIPTION	*Form Approved OMB No. 0704-0188*

Public reporting burden for this collection of this information is estimated to average 110 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4303, and to the Office of Management and Budget, Paperwork Reduction Project (0704-0188), Washington, DC 20503. Please DO NOT RETURN your form to either of these addresses. Send complete form to the Government Issuing Contracting Office for the Contract/PR No. listed in Block E.

1. TITLE	2. IDENTIFICATION NUMBER
Conference Agenda	DI-ADMN-81249A

3. DESCRIPTION/PURPOSE

3.1 The conference agenda provides information concerning purpose, location, schedule of conferences required to manage the acquisition of systems equipment, related items, and services.

4. APPROVAL DATE *(YYMMDD)*	5. OFFICE OF PRIMARY RESPONSIBILTY (OPR)	6a. DTIC APPLICABLE	6b. GIDEP APPLICABLE
931001	F/ESC/EN-4		

DATA ITEM DESCRIPTION - CONTINUED

7. APPLICATION/INTERRELATIONSHIP

7.1 This Data Item Description (DID) contains the format and content preparation instructions for the data product generated by the specific and discrete task requirement as delineated in the contract.

7.2 This DID supersedes DI-ADMN-81249.

8. APPROVAL LIMITATION	9a. APPLICABLE FORMS	9b. AMSC NUMBER F6968

DATA ITEM DESCRIPTION - CONTINUED

10. PREPARATION INSTRUCTIONS

10.1 Format. Contractor format is acceptable.

10.2 Content. The agenda shall include the following, where applicable:

a. The purpose and objective of the conference.

b. The conference location, date, and duration.

c. A daily chronological listing of each major topic or subtopic to be discussed and the time to be devoted to each topic.

d. A list of activities to be represented and identification of their responsibilities.

e. A list of subcommittees to be established during the conference and the proposed activity representation of each subcommittee.

f. Reference to and brief description of the results of previous meetings, when relevant.

(Continued on Page 2)

11. DISTRIBUTION

DISTRIBUTION STATEMENT A. Approved for public release; distribution is unlimited.

DATA ITEM DESCRIPTION - CONTINUED

DI-ADMN-81249A

Block 10, Preparation Instructions (Continued)

g. Location, schedule, and purpose or subject area to be covered by each subcommittee, when applicable.

h. Names of the conference chairperson, co-chair, and subcommittee chairs, when applicable.

i. Information on billeting, messing, transportation, and administrative services available to conference attendees.

j. Complete list of all documentation to be available for review.

k. Brief description of progress on actions or problems identified at previous meetings, when applicable.

l. Other pertinent information such as forms to be used, identification of any deviations or waivers, security classification, and clearance requirements.

CONTRACT DATA REQUIREMENTS LIST (CDRL)

CONTRACT DATA REQUIREMENTS LIST
(1 Data Item)

Form Approved
OMB No. 0704-0188

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A. CONTRACT LINE ITEM NO.	B. EXHIBIT	C. CATEGORY: TDP_____ TM_____ OTHER_X_____

D. SYSTEM/ITEM	E. CONTRACT/PR NO.	F. CONTRACTOR
Antitank Hamster		

1. DATA ITEM NO.	2. TITLE OF DATA ITEM	3. SUBTITLE
	CONFERENCE AGENDA	PROVISIONING CONFERENCE

4. AUTHORITY *(Data Acquisition Document No.)*	5. CONTRACT REFERENCE	6. REQUIRING OFFICE
DI-ADMN-81249A	SOW PAR 3.2.3	MARCORSYSCOM (PM)

7. DD 250 REQ	9. DIST STATEMENT REQUIRED	10. FREQUENCY	12. DATE OF FIRST SUBMISSION
LT	A	AS REQ	SEE BLK 16
8. APP CODE		**11. AS OF DATE**	**13. DATE OF SUBSEQUENT SUBMISSION**

16. REMARKS

14. DISTRIBUTION			
a. ADDRESSEE	b. COPIES		
	Draft	Final	
		Reg	Repro
MARCORSYSCOM (PM)		1	1
MCLB ALBANY		1	1

17. PRICE GROUP

18. ESTIMATED TOTAL PRICE

CONTRACT DATA REQUIREMENTS LIST (CDRL) - CONTINUED

16. REMARKS

BLK 4 - Delete paragraphs 10.2d, 10.2e, 10.2f of DI-ADMN-81249A

BLK 12 - Submit 30 days prior to each conference, meeting, audit, or review.

DISTRIBUTION STATEMENT A: Approved for public release; distribution is unlimited.

a. ADDRESSEE	b. COPIES		
	Draft	FINAL	
		Reg	Repro
MARCOMSYSCOM (PM)		1	1
MCLB ALBANY		1	1

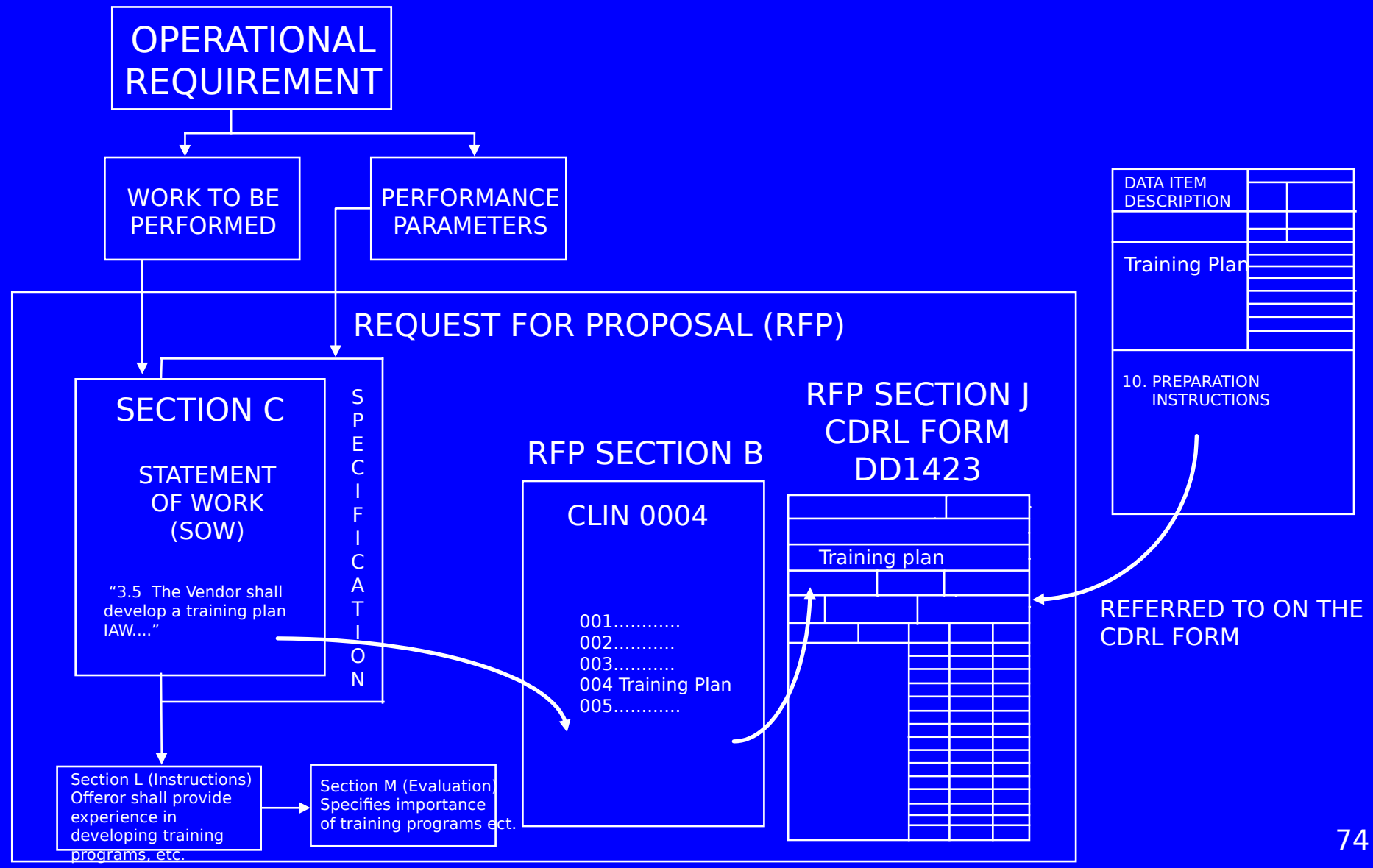
DID/CDRL EXERCISE

3.1.6 Meetings, Formal Reviews, Conferences, and Audits. The contractor shall plan, host, attend, coordinate, support and conduct the meetings, formal reviews, conferences, and audits (hereinafter called "reviews") described in succeeding subparagraphs. The reviews shall be conducted at Government and contractor facilities. Reviews requiring demonstration and/or examination of equipment shall be conducted at the contractor's facility. All such reviews shall be included in the program schedule and may be held concurrently with the Government's approval. The contractor shall prepare agendas, conference presentation materials, minutes and reports. The Government reserves the right to cancel any review or to require any review to be scheduled at critical points during the period of performance. Action item documentation, assignment of responsibility for completion of due dates shall be determined prior to adjournment of all reviews. A summary of all action items, responsibility part, and estimated completion date shall be included with the minutes.

(DI-ADMN-81249A, Conference Agenda)

(DI-ADMN-81250A, Conference Minutes)

SPEC-SOW-CDRL-DID RELATIONSHIP



REQUEST FOR PROPOSAL (RFP)

The RFP:

- Communicates to potential vendors exactly what the Government wants to acquire
- Solicits vendors to submit proposals
- Becomes the contract after contract award

The RFP must:

- Relay the user's needs
- Allow vendors to assess their ability to meet the requirements
- Allow vendors flexibility to use best business and technical approaches

WHAT ARE WE TRYING TO DO?

- Communicate requirements to the vendor:
  - Clearly,
  - Concisely, and
  - Completely

QUESTIONS THE RFP MUST ANSWER

- What do we want the vendor to provide?
  - Data
  - Hardware
  - Software
  - Services
- When do we want it?
- Where do we want it delivered?

RFP DIVISIONS

PART I - The Schedule

SECTION A	Solicitation/Contract Form
SECTION B	Supplies or Services and Prices/Cost (CLIN)
SECTION C	Description/Specification/Work Statement
SECTION D	Packing and Marking
SECTION E	Inspection and Acceptance
SECTION F	Deliveries or Performance
SECTION G	Contract Requirements
SECTION H	Special Requirements (SPI language)

RFP DIVISIONS - CONTINUED

PART II - Contract Clauses

SECTION I Contract Clauses

PART III - List of Documents, Exhibits and Other Attachments

SECTION J List of Attachments

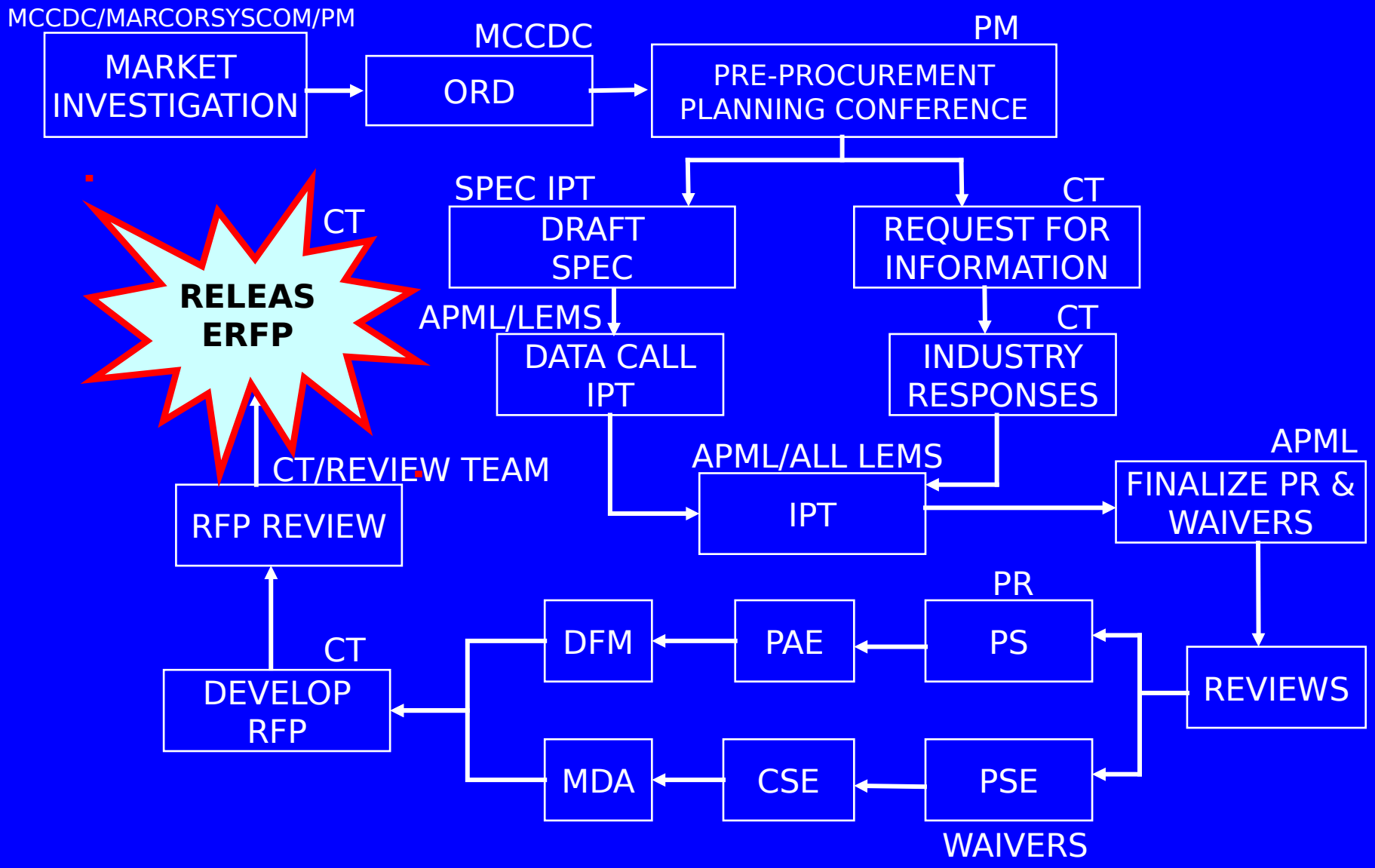
PART IV - Representation and Instructions

SECTION K Representatives, Certifications and Other Statements of Offerors

SECTION L Instructions, Conditions, and Notices to Offerors

SECTION M Evaluation Factors for Award

RFP APPROVAL PROCESS



SUMMARY

- Performance specifications are the preferred way of writing the requirements
- Performance based requirements describe “what” is needed
- The Specification, SOW and CDRLs are main components of the RFP
- The RFP becomes the contract
- In writing be clear, concise, precise, and consistent

- Thanks for coming! If you have any comments, please note them on the Comments sheet in Tab 12.